I/we want to provide a legacy of support to Carleton College, and have included a gift to Carleton in my/our estate plan as follows:

Name ___________________________________________ Second name (if joint gift) ________________________________

Preferred phone __________________________ Email ________________________________

Gift information

☐ Will or trust provision                  ☐ Donor advised fund (DAF) successor beneficiary
☐ IRA/Retirement plan beneficiary        ☐ Other ________________________________
☐ Life insurance beneficiary

Carleton will receive this gift:

☐ Upon my death    ☐ Upon the death of the surviving spouse/partner    ☐ Other ________________________________

This gift is designated to support:

☐ Carleton’s greatest needs as determined by the Board of Trustees (unrestricted)
☐ Existing scholarship fund ________________________________
☐ Please contact me to discuss how my gift could be used

Gift recognition

If you would like your gift included in your class’s 50th Reunion Class Gift and/or the Every Carl for Carleton Campaign, and you’ll be 70 or older by June 30, 2021, please complete the following two items:

1. This gift is stated as:
   ☐ A specific dollar amount: $ ________________________________
   ☐ A percentage of estate/account: ______ %
      The estimated current value of this gift is: $ ________________________________
   ☐ Other (i.e. gifts of real estate) ________________________________

2. The following are attached to document my/our gift provision(s) for Carleton
   ☐ A copy of the will or trust provision (if mirror provisions, both are attached)
   ☐ A copy of the account beneficiary designation form, and summary page from a recent statement
   ☐ A letter from my attorney, executor, or trustee describing the gift provision
   ☐ Other ________________________________
Estate contact information (optional, but very helpful)
Who would you like Carleton to contact upon your death to facilitate the distribution of your gift?

☐ Executor ☐ Trustee ☐ IRA Custodian/Plan administrator ☐ Family member ☐ Other ________________

Name ___________________________________________________________
Business _________________________________________________________
Address _________________________________________________________
Email ___________________________ Phone ___________________________

Comments/additional information

________________________________________________________________________

Donor signature ___________________________ Date ________________

Donor Signature (if joint gift) ___________________________ Date ________________

Carleton recognizes that this gift is subject to change depending on personal or economic circumstances. This form is not intended to be a legally binding pledge. The information you provide will remain confidential.

Please return this form to:
Carleton College Development Office
One North College Street, Northfield, Minnesota, 55057
planned-giving@carleton.edu

Questions? Please contact us:
Phone: 800-492-2275 or 507-222-4200
Email: planned-giving@carleton.edu • Web: giftplanning.carleton.edu

This gift qualifies you for membership in the JOSEPH LEE HEYWOOD SOCIETY